SKI UTAH

SKIER AND SNOWBOARDER SURVEY 2002/03
ON-MOUNTAIN SURVEY
SALT LAKE CITY AIRPORT SURVEY
WEB SITE SURVEY

F I N A L R E S U L T S
M A Y 2 0 0 3

P R E P A R E D F O R:

Ski Utah / Utah Ski & Snowboard Association

P R E P A R E D B Y:

RRC Associates
4940 Pearl East Circle, Suite 103
Boulder, Colorado 80301
303/449-6558

OVERVIEW / SUMMARY OF FINDINGS / RESEARCH HIGHLIGHTS

SKI UTAH SKIER AND SNOWBOARDER SURVEY 2002/03

ON-MOUNTAIN SURVEY / SALT LAKE CITY AIRPORT SURVEY / WEB SITE SURVEY

Final Report May 2003

INTRODUCTION

This is the final report highlighting findings from the 2002/2003 Ski Utah Skier and Snowboarder survey conducted on-mountain at 12 of the 14 Utah resorts this season by RRC Associates of Boulder, Colorado (Elk Meadows and Nordic Valley are the only two resorts not participating). Surveys were also administered simultaneously at the Salt Lake City Airport of skiers and snowboarders who had been in Utah on vacation and were waiting in the gate areas to leave Utah. An Internet survey of potential visitors to Utah who accessed either the Ski Utah or Utah.com websites was also conducted by RRC to capture input from an additional segment of skiers and boarders who are active in the market and who had already booked a trip or were considering Utah for a future trip.

Results from the on-mountain survey are based on 4,403 interviews completed between opening in November through April 13, 2003. Results are weighted to reflect the proportion of each resort's percentage of total statewide skier days for the 2002/2003 and 2000/2001 seasons (the 2001/2002 Olympic season was not included in the weighting, as it was somewhat of an anomaly with respect to skier visit totals and distribution). Results from the Salt Lake City Airport survey are based on 651 interviews completed between mid-December and March 29, 2003. Results from the airport survey are weighted to reflect the proportion of each airline's market share at the airport for 2002. Results from the web site survey are based on 3,452 completed surveys with potential visitors to Utah who accessed the web sites between November 8, 2002 and April 30, 2003 (2,793 responses from the Ski Utah web site and 659 responses from the Utah.com site).

Survey results generated from the total sample of respondents interviewed on-mountain at the resorts this season have a margin of error of about +/- 1.5 percentage points calculated for questions at 50% response[1]. Survey results generated from the total sample of respondents interviewed at the airport this season have a margin of error of about +/- 3.8 percentage points calculated for questions at 50% response. Survey results generated from the total sample of respondents interviewed on-line at the Ski Utah and Utah.com web sites this season have a margin of error of about +/-1.7 percentage points calculated for questions at 50% response.

Complete tables of results and open-ended comments from the survey are included in the Appendix section of the report for those interested in more detail.

---

[1] For the total sample size of 4,403 respondents interviewed on-mountain at the resorts, margin of error is +/- 1.5 percent calculated for questions at 50% response (if the response for a particular question is "50%"—the standard way to generalize margin of error is to state the larger margin, which occurs for responses at 50%). Note that the margin of error is different for every single question response on the survey depending on the resultant sample sizes, proportion of responses, and number of answer categories for each question. Comparison of differences in the data between various market segments, therefore, should take into consideration these factors (as a general comment, it is sometimes more appropriate to focus attention on the general trends and patterns in the data rather than on the individual percentages).

MAJOR HIGHLIGHTS / SEASON OVERVIEW / SKIER VISITS

National Visits: Above average snowfall in many parts of the country in the early season allowed many resorts to push up their opening dates and offer additional terrain and facilities, contributing to one of the best starts for the country in several years. Nationally, many regions of the country saw increases in business with ample snowfall prevailing. An increase in season pass sales in some regions, as a result of pent up demand for more typical snow conditions than seen in recent years, also clearly contributed to a surge in visits in some areas. Utah, as well as areas of the Pacific Northwest, seemed to be an exception early on in the season, however, with generally weak early season snow continuing into January. Utah snow conditions, although remaining inconsistent, improved into February and March, and estimated skier visits for the state finished higher overall for the year over the 2001/02 Winter Olympic season.

Although official figures have yet to be released by NSAA, skier visits, nationally, for the 2002/03 season are expected generally to be quite strong, based upon particularly positive conditions in the Northeast, Southeast, and Midwest regions. This news is especially positive in a time when the travel industry in general has been hit hard and suffering for a multitude of reasons ever since September 11th (and before). Regionally, the Northeast, Southeast, and Midwest regions of the country are likely to be substantially improved this season with much better snow, more days open this year, and the proclivity of skiers/riders to be traveling less and staying closer to home. The Rocky Mountain region is likely to be up, although less substantially overall, while the Pacific West region is likely to be down this year, pretty much across the board in California, Oregon, and Washington.

In many regions of the country, growth in skier visits slowed somewhat in January and February after a surge in visits through December, with a relatively dry January in some regions, lingering economic concerns, decreased international travel, and the threat of war with Iraq contributing to the slower pace. Despite excellent snowfall in most regions for March, the month was likely down sharply in many areas, especially those dependant upon "fly-in" destination business, due to the start of the war in Iraq, the economy, issues with certain of the major airline carriers, and the emerging SARS scare. While the country may come close to enjoying one of its best seasons in recent years, the combination of factors including the economy, the war, good snow and strong visits in many other parts of the country, decreased international travel, and the tendency for skiers and snowboarders to stay closer to home, limited the overall potential for Utah this season.

The remainder of this report documents the detailed findings from the research, including updated information regarding the demographic and economic characteristics of Utah skiers and snowboarders (both resident and non-resident), expenditures per person per day by category of expenditure and the resultant economic benefit returned to the State, geographic origins of visitors, factors affecting visitors' decision to visit Utah (including influence of the 2002 Winter Olympics), most important/effective information sources utilized in planning the trip, issues regarding the Internet, method of making reservations, method of transportation to Utah and to the resorts, nights stayed, days skied/snowboarded and which resorts visited, number of previous visits, intent to return, and quality of experience ratings. The table following the Executive Summary pages provides a snapshot comparison of this year's research results with the Ski Utah survey conducted in 1999/2000 (where applicable and possible).

The research conducted this past season is a complete profile of the Utah skier and snowboarder (as well as of potential future customers via the web survey) utilizing a combination of rigorous methodologies which will assist Ski Utah, its co-op partners, and the individual resorts in making difficult strategic and marketing decisions in order to maximize marketing dollars as effectively as possible. The data should serve Ski Utah and its partners well in future planning efforts in an ever increasingly competitive industry. Upon request, additional cross-tabs and information can be provided from the extensive survey database developed this past season, and we encourage you to draw upon this valuable resource as needs warrant.

EXECUTIVE SUMMARY

ON-MOUNTAIN SURVEY

- ***Utah vs. Out of State***: 44 percent of the respondents resided in the state of Utah (vs. 48% in the 1999/00 study), while 56 percent were from out of state (vs. 49% in 1999/00).

- ***Key States***: As a percentage of the U.S. domestic destination market only, the top states are California (16.5%), New York (8.6%), Texas (6.3%), Florida (5.2%), Nevada (5.2%), Illinois (4.4%), Arizona (3.6%), and Georgia (3.6%). Altogether, these eight states account for more than 50% of the U.S. domestic destination visits to Utah. Of the 16.5% visitors from California, 11.5% are from Southern California and 5.0% are from Northern California.

- ***Designated Market Areas (DMA):*** Examining the data by Designated Market Area (which is comprised of any number of counties in any given market area, many times across state lines), the New York, NY DMA tops the list with 11.7% of the domestic destination travel to Utah this past season (the New York DMA extends into parts of New Jersey, Connecticut, Pennsylvania, as well as New York). New York is followed by Los Angeles as the next biggest market (7.3%), then Las Vegas (5.0%), Chicago (4.1%), and Boston (4.0%).

- ***International Visitors***: International visitors represented about 3 percent of the total sample. The U.K. (0.8%) was the largest international market represented. It should be noted that international travel was down this year in most all tourism and leisure travel industries as a result of the multiple world-wide issues and disruptions that were taking place. In light of these circumstances, the ability of Utah to record 3 percent share of total visits (6 percent share of all winter destination visits) is quite positive.

- ***Nights Stayed—Days Skied/Snowboarded:*** Out of state destination visitors planned to stay an average of 5.4 nights and ski/ride 4.5 days "this trip." International visitors planned the longest trips, with an average of 8.6 nights and 7.0 days skied or snowboarded. Among international visitors, 40 percent stayed ten or more nights and 30 percent skied/boarded nine or more days during their trip. This statistic, alone, illustrates one of the positive impacts international guests have on the overall winter economy.

- ***Family/Marital Status***: Thirty-three percent of the respondents were single, 30 percent a parent with children at home, 10 percent youth living with a parent, 17 percent part of a couple with no children, and 10 percent were empty nesters (children no longer at home).

- ***Income:*** Overall, median income was approximately $88,000 this season as compared to $62,000 estimated for 1999/2000. Median income among out of state and international visitors was $111,000 this year vs. $93,000 estimated for 1999/2000. In comparison, median income among Utah residents was $64,000 this year vs. $40,000 estimated for 1999/2000.

- ***Equipment Type***: Seventy-one percent were alpine skiers, 26 percent snowboarders, 3 percent telemarkers, and 1 percent snowskates/skiboards. Snowboarders were clearly more prevalent among Utah residents, with 35 percent of the locals and 42 percent of the day visitors on snowboards. The proportion of overall visits nationwide that are attributable to snowboarders was about 30 percent this season (based on preliminary NSAA Demographic survey data). The overall average for snowboard participation in the Rocky Mountain region is about 22 percent. Snowboard participation is strongest in the Pacific West region at about 44-45 percent.

- ***Number of Previous Visits to Utah***: Of interest, 33 percent of the overnight visitors were on their first ski/snowboard trip to Utah (which is fairly average compared with other similar resort destinations). That included 33 percent of out of state visitors and 54 percent of the international visitors. Only 13 percent had taken more than five previous winter trips to Utah (which appears somewhat below average compared with other resort destinations) and, on average, the overnight visitors overall had taken 3.6 previous trips. The challenge for Utah is to convert this relatively large percentage of first-time and infrequent previous visitors into more frequent, loyal, repeat customers.

- ***Method of Making Reservations***: About one-third (31 percent) of the overnight guests made their reservations direct to the lodging property, 21 percent utilized the Internet, and 10 percent made their reservations through family or friends. Only 11 percent utilized a travel agent and 7 percent utilized central reservations. Out of state visitors were relatively more likely to call direct to lodging properties or use the Internet while international visitors were most likely to utilize travel agents.

- ***Travel to Utah / Airline Used***: The vast majority of the overnight visitors, 81 percent, flew to Utah from their home, while 16 percent drove (vs. 78 percent fly and 21 percent drive in 1999/00). Delta Airlines was by far the most popular individual airline used (49 percent) followed by Southwest (13 percent), United (11 percent), and American (10 percent).

- ***Primary Reason for Choosing Utah:*** A wide range of reasons were quoted as representing the primary reason for choosing to come to Utah this trip. Primary motivators among international visitors were snow conditions (47 percent), the presence of multiple ski areas (34 percent), the quality of skiing/snowboarding offered (34 percent), children's programs / ski school (12 percent), and easy to fly to Salt Lake City (12 percent). In comparison, among out of state visitors, the motivators were more diverse and more evenly distributed. The quality of skiing/snowboarding led (32 percent) followed by snow conditions (27 percent), easy to get to ski areas from the airport or Salt Lake (26 percent), easy to fly to Salt Lake City (22 percent), the presence of multiple ski areas (21 percent), friends or family living here (19 percent), previous experience or always come to Utah (18 percent), friends/family recommended it (15 percent), and family orientation (13 percent).

- ***Influence of the Olympics:*** As in the case with the web site survey respondents, the hosting of the 2002 Winter Olympic games had relatively significant direct impact on the people's decision to visit this past season. Fourteen percent overall indicated the Winter Olympics had strong influence on the decision to visit (ratings of "4" or "5" on a 1 to 5 scale). Among international visitors, impact was stronger, with 24 percent indicating a strong influence. Similarly, among first-time visitors to Utah, impact was stronger, with 25 percent indicating a strong influence as compared to 11 percent of previous/repeat visitors.

- ***Planning the Trip:*** Planning of the trip began rather early for many of the destination visitors. Thirty-eight percent of the out of state residents and 43 percent of the international residents began planning their trips during or before September of 2002. Another 20 percent of out of state and 35 percent of international began planning their trip between October and November (58 percent of out of state and 78 percent of international having begun planning by the end of November).

- ***Booking the Trip:*** Booking of the trip also began rather early in the season, especially for the December and holiday periods. Booking patterns clearly continued throughout the winter, however, as many booked with relatively short lead times. Twenty-five percent of the out of state and 26 percent of the international visitors booked their reservations during September or earlier. Twenty-four percent of the out of state and 29 percent of the international visitors booked their reservations in October or November (about half of all reservations booked by the end of November). Another 24 percent of out of state and 21 percent of international visitors booked in December or January (approximately 75 percent of all reservations booked by the end of January).

- ***Information Sources:*** Among the wide variety of potential information sources utilized (that were important in influencing the vacation decision this trip), the Internet / web site was clearly the most important—66 percent chose it as the single most important source influencing the vacation decision, followed by magazines (10 percent) and brochures (9 percent). Interestingly, while TV in general was not a particular influential media source overall, international visitors did tend to mention it frequently as being influential (18 percent ranked it a "4" or "5" on a 1 to 5 scale vs. 5 percent of out of state visitors).

- ***Use of the Internet to Book Travel:*** Twenty-six percent indicated they actually booked some part of their trip via the Internet. Out of state visitors (47 percent) and international (35 percent) were most likely to have booked some part of their trip via the Internet. For those who did, most commonly booked were airfare (79 percent), lodging (42 percent), rental car (40 percent), and lift tickets (11 percent). Many different web sites were used. Most popular were airline web sites (38 percent), car rental company web sites (22 percent), Expedia (17 percent), Travelocity (17 percent), Orbitz (14 percent), and resort or hotel web sties (16 percent).

- ***Quality of Experience Ratings:*** One of the key areas of research is the quality of experience which visitors ranked for their trip. A broad range of trip attributes were considered. Clearly, snow quality was an issue during the early season period, but conditions did improve as the season progressed. Typically, when snow is scarce, it negatively impacts other aspects of the vacation experience, since this aspect is such a core driver of the total experience. One of the interesting observations is that while quality of snow was indeed one of the lowest rated of the variables for the season, other aspects of the trip, particularly non-ski elements, did receive positive ratings.

  Overall vacation experience received the most positive feedback, with an overall rating of 4.3 (on a scale of 1 to 5, where 1 is "poor" and 5 is "excellent"), with 90 percent of the respondents considering their experience as "very good" or "excellent." Other clear strengths of the Utah trip experience (attributes with average scores of 4.0 or higher) include convenience (both ease of getting to Utah and ease of getting from the airport to the ski areas/lodging), the quality of the lodging accommodations, level of crowding, and the overall atmosphere/ambiance of the resort or town/village. The next tier of ratings, which were still reasonably positive (with average scores between 3.7 and 3.9) included the overall level of service (3.9), the quality of the ski/snowboard experience (3.9), the availability of direct flights (3.8), and the overall price/value (3.7). Another group of categories (all scoring 3.6 on average), included low-cost airfare, quality of snow, and the variety of things for kids and families to do. While still rated generally positive, these latter three aspects all received 13 to 15 percent responses of "poor" (while rated higher overall, availability of direct flights also received 15 percent responses of "poor"). For snow conditions, ratings went from an average of 3.3 in January to 3.8 in February to 4.0 in March. The area of the trip which was least well regarded was ability to get a drink (3.5), with 20 percent responses of "poor."

When the ratings of experience are compared by visitor type, a few patterns are worthy of note. International visitors are more positive than overnight out of state or Utah based residents on several of the experience factors, most notably overall ski/snowboard experience, overall level of service, level of crowding, and things for kids/families to do. International visitors were more negative, however, on certain issues, particularly related to access and convenience. Ratings by international visitors were substantially lower in availability of direct flights, low cost airfare, and convenience of getting to Utah. These patterns may be understandable, given the distance of travel for this international visitor; nevertheless, they are important factors to resolve if Utah is to substantially expand its international draw.

- ***Likelihood of Return Within The Next Two Years:*** Overnight visitors were asked their likelihood of returning to Utah for another ski/snowboard trip within the next two years. Overall, expectations were reasonably strong, especially in light of the difficult early season conditions. About half of the respondents indicated they definitely would return and another 21 percent indicated they probably would. Only 9 percent indicated they would not likely return within this period.

- ***Most Important Factor Influencing Your Decision of Whether to Return:*** Everyone, after rating their quality of experience, was asked what particular factor would most influence their decision to return. Three factors clearly stood out as being most important. They included the quality of snow (25 percent most important factor), the overall quality of the ski/snowboard experience (23 percent), and the overall vacation experience (18 percent). Of more "mid-level" importance were convenience of getting to Utah (8 percent), overall price/value (6 percent), and cost of airfare (5 percent).

- ***Lift Ticket Usage:*** A variety of lift ticket questions were asked of the respondents. Over half, or 58 percent, were using a single day ticket (today). The next most popular type was season pass, used by 16 percent (predominantly locals and day visitors). Among other types, 12 percent were using multi-day tickets, 6 percent half day, and 1 percent coupon books. Less than 1 percent each were using the Ski Utah International Passport, Ski Salt Lake Super Pass, and Park City / Silver Passport. About 19 percent altogether were using some kind of season pass/coupon book/passport. Thirty-nine percent of local residents were using a pass, 24 percent of day visitors were, while 22 percent of international visitors were using some sort of pass (note that many international visitors, due to possible differences in interpretation of the various types of tickets and passes posed in the question, may have considered the Ski Utah International Passport as a "season pass"). Five percent indicated they were utilizing a combined Alta/Snowbird pass and 1 percent a combined Brighton/Solitude pass at some time during the trip. If one was using a multi-day ticket, the average number of days were 4.2 days. The average price paid for single day tickets, specifically, was $42 ($40 median). The average season pass price was $417 ($300 median).

- ***Total Ski/Snowboard-Related Spending / Economic Impact:*** Total ski/snowboard-related spending in Utah during the 2002/03 season is estimated at approximately $704 million (excluding airfare—see explanation of economic impact calculations on pages 53-58). This includes $539 million in spending by out-of-state/international residents, and $165 million in spending by in-state Utah residents. Based on survey responses, out-of-state/international skiers are estimated to spend an average of $251.61 per capita per day while in Utah, excluding airfare. An average of $82.14 per day is spent on-mountain (33 percent of total), while $169.47 is spent in town (67 percent of total). These results illustrate that ski resorts themselves are only one of the many beneficiaries of skier expenditures, with off-mountain businesses reaping the largest share of the benefits.

SKI UTAH AND UTAH.COM WEB SITE SURVEYS

- ***Previous Visits to Utah / Visits to Other Regions:*** Interestingly, almost half of the respondents to the web survey (48 percent) had not taken an overnight trip to Utah within the past 3 years (conversely, 52 percent had taken a trip). In comparison, about 46 percent had taken at least one overnight trip to Colorado during the past 3 years. Smaller proportions had visited Tahoe (26 percent), New England (26 percent), and Canadian resorts (24 percent).

- ***Intent to Ski/Snowboard Utah:*** Most of the group were seriously considering taking an overnight trip to Utah this season, with 67 percent being likely or definite and another 15 percent indicating "maybe." Only 17 percent were unlikely (7 percent) or not at all (10 percent). In comparison, only 22 percent were seriously considering a trip to Colorado, 12 percent to Tahoe, 19 percent to New England, and 11 percent to Canada.

- ***Reasons for Possibly Not Visiting Utah:*** Also quite interesting, among those who indicated they might not visit Utah this season, the most frequently mentioned reasons why included perceptions that Utah is expensive to get there (38 percent), Utah is expensive in general (34 percent), it's not close to home (30 percent), never been there / not familiar (20 percent), and difficult access / difficult to get there (10 percent). Obviously, Utah's reputation among those familiar with the destination has been one characterized by easy access and proximity of the resorts to Salt Lake City, as well as an experience that is an overall relatively good value compared with other destination choices. Results here would suggest that reinforcement of this central message might be warranted, particularly for those who have not been to the state or might be considering a trip in the future.

- ***Importance of Factors Influencing Destination Choice / How Utah Rates on Those Factors:*** Several potential factors were rated by web site respondents in terms of their relative importance in influencing a person to select a particular destination choice. Those attributes which were ranked of greatest importance (having an average score of 4.0 or higher on a scale of 1 to 5), included:

  - Snow conditions.
  - Overall value.
  - Availability and cost of lodging.
  - Discount lift tickets and package deals.
  - Size of mountains / variety of trails.
  - Convenience / easy to get to.
  - Lack of crowds.
  - Friendliness of employees.

  Utah was then ranked on all the various factors which were identified. Of those which were considered to be most important in the choice of destination, Utah ranked highest (score of 4.0 or higher on a scale of 1 to 5, where 1 is "poor" and 5 is "excellent") on the following factors:

  - Snow Conditions.
  - Size of mountains / variety of trails.
  - Convenient to get to.
  - Friendliness of employees / customer service.

  These four factors, above, were areas which were <u>both</u> very important and where Utah ranked very well. Interestingly, Utah ranked only moderately (between 3.0 and 3.9) in the areas of overall value, lack of crowding, discount lift tickets and package deals, availability and cost of lodging. These latter categories appear to represent priority areas where Utah might attempt to improve its image either by offering better and more appealing "product" or promoting a positive image more effectively. They are areas which are important to the majority of consumers, but not particular perceived strengths of the State.

  Interestingly, Utah's hosting of the 2002 Winter Olympics resonated well with the majority of the web site respondents, as 63 percent felt Utah did an excellent or very good job (3.9 average) of hosting the event. Similar to the on-mountain results, 16 percent felt that this was a very or extremely important factor in choosing a destination to visit. Clearly, the fact that Utah was the host site for the Winter Olympic games represents a clear basis for differentiation among other regions of the country; however, its power to drive future business solely on that basis may be limited. Obviously, the international media exposure Utah received from the games has considerable value, but that "brand" may need to be combined with other key factors as identified above, e.g., snow conditions, mountain quality, convenience, etc. to truly be effective.

- ***Importance of Non-Skiing Activities:*** Respondents were also asked what activities besides skiing/snowboarding were important when taking a destination trip. A fairly clear hierarchy emerges among a wide range of potential choices. Among the most often mentioned were food and bar / nightlife (55 percent) and rest and relaxation (55 percent). Next in importance were shopping (36 percent) and sightseeing (34 percent). The third tier of popular activities were snowmobiling (25 percent), hot springs (23 percent), tubing (19 percent), movie theatre (19 percent), ice skating (18 percent), and sleigh rides (16 percent).

- ***Travel Planning:*** Visitors to the web site survey were asked at what stage in their winter vacation planning they were. One quarter had already booked their trip to Utah, 28 percent were currently in the process of planning a trip, and 34 percent were considering a potential trip to Utah. Smaller percentages were just looking for information or considering a trip somewhere else. Thus, 62 percent of the visitors to the sites were actively involved in planning or were considering a trip to Utah (in addition to the 24 percent who had already booked their trip). Clearly, this illustrates the importance of the web sites as potential "influencers" of future destination business.

- ***Purpose for Visiting the Web Site / Kind of Information Looking For:*** Respondents utilized the Utah web sites for a wide variety of reasons. Most frequently mentioned were 65% deals / special offers / pricing, 57% snow conditions / weather cams, and 41% lodging info. Next most popular reasons for visiting were 37% lift tickets, 31% maps, 27% area photos, 22% overall comprehensive information on Utah, 20% activities. Other reasons included 17% dining / restaurants, 14% ground transportation, 14% airline schedules and info, 14% equipment rentals, 8% lesson information.

- ***Popular Web Sites Used to Book Travel:*** The most popular web sites used to book travel among the respondents are 38% airline web site, 37% Expedia, 36% Travelocity, 28% Orbitz, 16% resort or hotel webs site, 14% Priceline, 12% car rental company web site, 9% Hotwire, 4% Lowestfare, 3% Flycheap, and 2% RSN. Only 19 percent of the respondents indicate they don't book travel over the Internet. When asked which travel related web site was the best, respondents indicated 24% Travelocity, 23% Expedia, 15% Orbitz, 12% airline web site, 6% resort or hotel web site, 5% Priceline, and 2% Hotwire.

- ***Satisfaction With Ski Utah and Utah.com Sites / Web Site Ratings:*** Ratings of the Ski Utah and Utah.com web sites were nearly identical in result and generally quite positive. Overall, 88 percent found the information they were looking for at the sites (90% at the Ski Utah site vs. 83% at the Utah.com site). In comparison to other travel web sites they have visited, 51 percent rated the Utah sites very good and 24 percent rated them excellent in ease of navigation / organization (4.0 average rating on the 1 to 5 scale). No one rated the sites "poor" and only 1 percent indicated a rating of "not very good." Similarly, in comparison to other web sites, 50 percent rated the Utah sites as very good and 27 percent excellent in terms of providing current and up-to-date information (4.0 average score). Fifty-two percent also rated the Utah sites very good and 27 percent excellent in terms of their overall impression (4.1 average score).

Finally, over half of the web site respondents (53 percent) were interested in participating in follow-up research and 66 percent would like to receive e-mail updates from Ski Utah and/or Utah.com related to travel information, current conditions, etc. We can forward email lists for both of these categories.

The remainder of this report documents the full detailed findings from this season's research, following the table comparing this year's research results with the Ski Utah survey conducted in 1999/2000.